

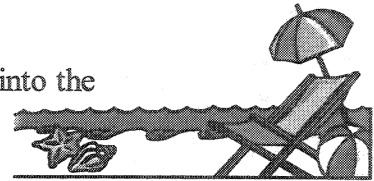
## Chapter 3 *Marketing*

### Module 2: The Marketing Plan

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#### Step Up and Step Out to Write A Marketing Plan

A cross-country family vacation doesn't begin with hopping into the station wagon and driving to your final destination. All family members want to help with the planning so that they get to do what *they* want to do!

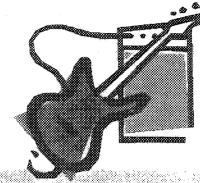


This same idea applies to marketing and the establishment of a marketing plan. You'll want to plan to meet different needs (or wants) and then promote the ideas so that everyone will *want* to get involved!

#### Shake, rattle, and roll into M-and-M's:

- ♥ How will everyone know about your initiative, unless you tell them?
- ♥ How will people participate in an activity if they don't know about it?
- ♥ How will people know they have something wonderful to gain from an activity if they aren't told?

For all these reasons, and *more*, you *need* a marketing plan! Planning for marketing is creative fun at its best. This is your marketing teams' chance to "shake, rattle and roll" into marketing and modeling!



#### Keep the plan simple

A marketing plan is your coalition's "rock and roll song" from beginning to end. It tells the story of your action plan, but does it with flair! Who wants to rock and roll to words without the music? The music makes us to *want* to move! Your marketing plan should do the same.

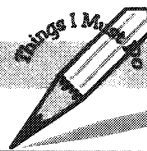
Use the action plan as the words to your “song”, but create the music with the marketing plan that makes us all want to rock and roll! Going through the steps and writing the music (marketing plan) is important. Otherwise, you have no means by which to teach your “song.” In other words, a written plan makes it possible for you to communicate goals to all who are involved or who will become involved!

### Points to remember in planning

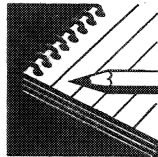


- ♥ Keep it simple and inexpensive.
- ♥ Make it flexible and subject to frequent review and revision.
- ♥ Use it as a written *guide* to promote the action plan set forth by your coalition.

### Writing the plan



You may come up with a way to write your plan based on the experience of your team members, but the following steps provide an easy to use format.



#### *Steps for Writing a Marketing Plan*

1. Begin with your action plan
2. Identify the “customer”
3. Identify customer group interests
4. Develop action(s) to promote/sell
5. Identify marketing tools
6. Develop a budget if necessary
7. Develop an action planning timeline

### Shake, Rattle, and Roll to Market and Model! Dancing Through the Marketing Steps:

#### 1. Begin with your action plan

Your coalition is in the business of increasing opportunities for healthy eating and activity choices for kids through community involvement. The action plan developed in **Chapter 3 Module 4: Action Planning Using VMSEA** provides the actions you created to increase those opportunities. They will be used as the basis for your plan. Have them available to take the following marketing steps. Several examples of how the objectives developed in your *action plan* will be used are provided:

**Examples:**



**Example I:**

**Objective:** Incorporate daily physical activity in every 3<sup>rd</sup> grade classroom by November 12.

**Marketing action:** Begin a creative challenge contest whereby teachers and students write newsletter articles about how they incorporated physical activity into learning activities. Give a “prize” to all classes that submit articles.

**Example II:**

**Objective:** Increase school lunch participation 10% by May 15.

**Marketing actions:**

- Promote changes in school meals with theme days
- Promote changes in school meals with newsletter articles
- Promote school meals by beginning a Kid’s Lunch Club Newsletter

**Example III:**

**Objective:** Incorporate healthy eating choices and physical activity into an after school program for middle school students by January 20.

**Marketing actions:**

- Plan a newspaper article about the upcoming changes
- Invite a television station to visit and interview students once the plan is implemented
- Invite parents to the school to observe and participate in the changes

## 2. Identify the “customer”

The *customer* is defined as the community group to whom you want to “sell” or to increase participation. Community groups identified in strategic planning include kids, parents, teachers, administrators, school lunch staff, and community members. School-age kids will be an important “customer” in your marketing plan, but marketing to other groups is equally important.



Whether it is going to Grandma’s after school, or visiting the town library on a Saturday, everyone in the community has some effect on a child’s life and can make a difference.

“Linking” customers in your plans whenever possible strengthens the initiative.

### Examples:



**Example I:** The impact grandparents and seniors have on the family and community environment is not always recognized. You may want to target seniors at a congregate meal site for classes on healthy snacks. Link this program to kids by inviting them to the meal site to attend a tasting party with their grandparents.

**Example II:** The coalition can assist a variety department store in setting up a display of inexpensive “toys” with tips on how to have “fun” (with increased activity). Ideas would be chalk for sidewalk art (have a community art contest and get everyone outdoors to view), beanbags for hopscotch, soft balls for kick ball, and Frisbees.

**Example III:** Another example would be expanding a senior citizen walking group to include other age groups and call the group “Walking Through-Out Life.” Linking kids and seniors creates new marketing opportunities for each customer group.

### 3. Identify customer group interests

What are you trying to market, or “sell?” What’s in it for the customer?

The benefits of healthy eating and activity sound simple but aren’t. Just because something is good for us, doesn’t mean we will want it. We all know that healthy eating and activity choices can reduce the risk of health threats from problems such as heart disease and cancer, but many people aren’t practicing those habits.



At times it is necessary to gather more information about what *might* interest a customer to “sell” an idea, product, or service. Other times it is necessary to remove a problem, such as lack of time or money, to interest a customer.

#### Information gathering

Ask people for thoughts about what it would take for them to “buy” your product or service, and incorporate their suggestions in your plan. Use surveys, listening sessions, and other available information.



Keep in mind that creating healthy activity and eating habits, involve making very personal choices. The reasons people make changes depend on many personal factors. A coalition should not feel responsible for making sure people change. A goal of the school health initiative is to create *opportunities* for healthy choices.

## Problem identification

Keep in mind that problems (“barriers”) to making healthy changes must be removed before something can be of interest, or perceived as a benefit. Creating opportunities for making healthy choices where we live, learn, and play is very dependent on removing the problems that keep us from making the changes. The following examples show how various problems can be “barriers” to creating change.

### Examples:



**Example I:** Obviously, it might be hard to promote a class that uses nursery rhyme games to a 15 year-old boy! There is **no interest**.

**Example II:** It is a little harder to recognize that it may be difficult to promote a twice a week, three hour per night healthy cooking class to a community full of busy working moms because of the time involved. With a little change...maybe a once a week, hour-long class with quick cooking tips, it would be easier to promote! A lack of **time is a barrier**.

**Example III:** Buying school lunch may not be the “cool” thing to do in some schools. Consider enlisting the help of students to determine how this **social barrier** can be overcome so that school lunch can *become* the “cool” thing. A marketing plan may involve changing the image of school lunch by asking them to create different menu names, or the look of the way the meal is served. Ask students for menu ideas and perhaps placing lunch or breakfast in a brown bag for “grab and go” would make it “cool!”

## 4. Develop action(s) to promote/sell

There are “selling points” that could be used to promote all of the marketing ideas that have been given in the previous examples. Note that all of these selling points are *actually* win/win situations of the same type discussed in the Chapter 1 **Coalition Building!**

### Examples:



**Example I:**

**Objective:** Incorporate daily physical activity in every 3<sup>rd</sup> grade classroom by November 12.

**Strategy:** Have teachers integrate physical activity in teaching various subjects such as math, spelling, or social studies.

**Marketing action to promote the objective to teachers:**

- a) Make teachers aware that incorporating physical activity in the classroom can help to control poor behavior.
- b) Provide easy to use suggestions for incorporating physical activity into various subjects.

**Marketing action to promote healthy changes to parents:** Begin a creative challenge contest whereby teachers and students write articles for a parent newsletter about how they incorporated physical activity into learning activities.

**Marketing action to promote the challenge contest to students and teachers:** Give an inexpensive “prize” to all classes that submit articles, i.e., a special game in PE!

**Example II:**

**Objective:** Develop opportunities for senior citizens to model healthy choices for kids by April 14.

**Strategy:** Expanding a senior citizen’s walking group to include other age groups.

**Marketing action to promote to senior citizens:** Create an exciting, new name and make seniors aware of the joy of having kids join the group. The group might be called “Walking Through-out Life.”

**Marketing action to parents and kids:** Promote kids having an opportunity to do something safe and fun *and* increase their activity levels.

**Example III:**

**Objective:** Increase adult opportunities for noncompetitive physical activity by October 10.

**Strategy:** Work with the recreation department to begin an open swim program in the evenings.

**Barrier to participation:** A person who works 3:00 p.m. until 11:00 p.m. is not going to recognize the benefit of an open swim time scheduled from 7:00 p.m. until 8:00 p.m. at the community pool.

**Marketing action to promote to the community-at-large:** A *free* open swim time at two different times of the day to meet the needs of people working different shifts.

**Marketing action to promote to the recreation department:** The open swim time provides an opportunity for people to come use recreation facilities and possibly sign up for other programs.

## 5. Identify marketing tools

There are many tools you can use to sell your idea. Remember to keep the marketing plan simple, consistent with your coalition’s objectives, and within your budget.

Different tools you can use and examples of each:

### **A. Prominent individuals to model changes**

Find role models everywhere kids live, learn, and play!

**Examples:**



- ♥ The college tennis player, the former high school state cross country champion, the city's pro hockey team members, and the college women's basketball team are all examples of celebrated athletes that can model lifestyle behavior. Use their visibility to support and promote projects and events.
- ♥ The school principal who leads stretches over the intercom every morning
- ♥ The coalition leader who incorporates physical activity in coalition meetings.
- ♥ The teacher who plans healthy eating choices in the classroom
- ♥ The PTO that offers healthy eating choices at events

### **B. Newsletters**

One of the easiest and least expensive tools is a newsletter. Many times a column can simply be added to an existing newsletter, making your task easier. Come up with a "catchy" name and insert a bit of the unusual, to draw interest.

**Examples:**



- ♥ "The LEAN Corner, Pick 3: Parents Pyramid Power" –and- "The Health Pie" are ideas for parent newsletter titles that help identify the program, and give it a personality of its own
- ♥ Newsletters can be created just for teachers or for all school staff
- ♥ Newsletters can be created for community businesses

### **C. Bulletin boards and message boards**

This is a simple way to get people involved and impact their immediate environment.

**Examples:**



- ♥ A bulletin board display at the local library
- ♥ Fruit and vegetable art work in the supermarket
- ♥ A health tip of the day on the school's message board
- ♥ A bulletin board in an employee lounge that provides recipes for healthy easy to prepare meals

#### **D. Local media, i.e., television, radio, newspaper, computer web pages**

Look for people with expertise in these areas.

##### **Examples:**



- ♥ Local interest stories
- ♥ Contests
- ♥ Public Service Announcements, i.e., for meetings or events
- ♥ A Chamber of Commerce web page

#### **6. Develop a budget if necessary**

Your marketing plan requires resources, financial and otherwise. Money doesn't grow on trees, and your marketing team doesn't have or really require unlimited funds. The ideas below are suggestions for working on a shoestring budget.

- a. Network throughout the community to locate resources. Ask local civic groups for assistance with either money or manpower. The list of potential contributors can be quite varied and large.
- b. Ask for commitments from your local media (radio, cable TV, network TV, newspaper, free papers, billboards, etc.) for space, time and production.
- c. Seek assistance from businesses. Businesses are always looking for low-cost promotional opportunities that spread their name further into the community as a business that provides goodwill.
- d. Seek funding assistance. Determine the costs associated with your promotional strategy and seek assistance. Search for local, state or federal funding opportunities.
- e. Once again, think outside of the box – be creative!

##### **Examples of creative funding:**



- ♥ Ask a senior citizens group to sponsor a hike and picnic to raise money for a community library summer reading program for kids
- ♥ Ask the Chamber of Commerce to donate money to purchase shirts for coalition members to identify the initiative and create visibility in the community
- ♥ Find volunteers to set up a kids' reading program on Saturday mornings at the local supermarket to provide visibility for the initiative *and* advance goals of the coalition
- ♥ Sponsor a recognition award for businesses that promote the goals of the coalition...another win/win situation for everyone



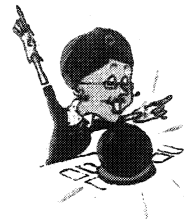
- ♥ Enlist the help of a local bank to donate space and cover handout expenses for “Lunch and Learn” nutrition classes for the community.

## 7. Develop an action planning timeline

Most marketing campaigns are designed to have definite beginning and ending points for each strategy designated. Checkpoints are also included along the way to measure results against desired objectives. Questions that may be used as checkpoints:

- ♥ How many people are you reaching with your message?
- ♥ Have your messages created interest based on the needs of the target market?
- ♥ Have your messages made people aware that previous problems (barriers) have been solved?

Your initiative will be long-term, spread over months, hopefully years, and marketing is an ongoing process. It will be helpful to develop a good system for maximum effectiveness by:



1. Developing a timeline for the coalition’s overall objectives and activities
2. Developing a second timeline that details only the marketing activities set forth in the marketing team’s plan.

Plan the two timelines to complement each other so the marketing team is aware of the coalition’s overall plan while they focus on immediate marketing needs. There is a timeline example and timeline form at the end of the module along with an Environmental Change Plan for the team to begin writing action specifics.

The challenge is to create a marketing plan that will become a lifetime approach to nutrition and activity. Some plans are golden oldies; some are pop songs that wear out. Building a “Review” of marketing strategies into your coalition’s timeline will maintain ideas that stay on the top 10 hit list!

## **Marketing is fun, but watch for the “downs”**

### **Use patience!**

A coalition sometimes needs a little patience to see a plan through the rough times. Programs or events may start small and take several years to build. Be a cheerleader and celebrate the small successes to maintain coalition interest. Patience and long-term planning will allow your efforts to be successful.

#### **Examples:**



- ♥ It is not uncommon to hear of a 10 K walk/run that started with several hundred participants, but has grown to hundreds or thousands of participants.
- ♥ A healthy “chili recipe contest” may start with five contestants, but grow to ten or twenty times that after several years. If organizers had given up in the first few years, the event would never been able to grow!

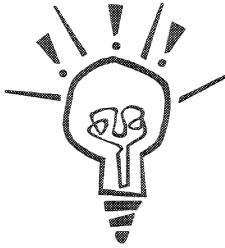
### **Check to make sure the plan is really feasible and the coalition is not competing with a similar idea, product, or service in the community.**

In other words, is there really a need for the idea, product, or service you are wanting to market? Are there customers who might be willing to “buy” it? Success isn’t ensured just because you have a great idea for a product. Look at what already exists in your community before starting something that nobody wants, or a project that might be in competition with something similar. An example of how a great idea “backfired” is presented below.

#### **Example:**



Get-it-Right School had grand thoughts about a Latch Key Program. They planned to include after school activity, healthy snacks, and tutoring; those things would surely make a healthy difference for many students. After several months of time invested in planning, they found it met with tremendous opposition because it competed with a very popular daycare center in town. The coalition learned a good review of community wants and needs before beginning a new program is very valuable.



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**Module Tip:**

A coalition should not feel responsible for making sure people change. A goal of **Step Up and Step Out** is to create *opportunities* for healthy choices. The marketing plan creates awareness and invites participation in the opportunities that have been developed.

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**FAQs:**

- ❑ **Question:** Marketing sounds so complicated. What if we can't find a person with a marketing background to help the coalition?

**Answer:** While it would be great to find a person with a marketing background, marketing does not need to be complicated. The most important points to remember: 1) Identify factors that would make people want to take advantage of the opportunities you develop and, 2) Communicate what is being done/planned so people are aware of changes and opportunities offered.

- ❑ **Question:** How can we tell if the marketing plan is working?

**Answer:** It is helpful to build in measures of success just as you do for the other coalition actions being planned. **Questions to ask:** 1) How many people are you reaching with your message? 2) Have your messages created interest based on the needs of the target market? 3) Have your messages made people aware that previous problems have been solved?

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**Module Glossary:**

**Promotion:** An action taken to promote or "sell" an idea or activity.



**Example: Two Year Coalition Timeline**

Activity	Responsible Parties	Year _____												Year _____											
		J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
Physical Activity in the Classroom	4 <sup>th</sup> and 5 <sup>th</sup> Grade Teachers					x	x	x	x	x	x	x	x	x	x	x	x	x	x						
	Education Committee																			x					
Health Fair																									
Community Review	Full Coalition	x																		x					

**Marketing Timeline**

Activity	Responsible Parties	Year _____												Year _____											
		J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
Newspaper Articles	Marketing	x				x				x			x		x								x		x
‘For the Health of It Week”	Chamber of Commerce/Marketing						x												x						
Public Service Announcements –Radio	Marketing									x					x							x			
Community Review	Full Coalition	x											x			x								x	

## Two Year Coalition Timeline

[illegible]

## Marketing Timeline

[illegible]



## Environmental Change Plan

Objective:

Environmental change methods planned. Check all that apply.	Actions and resources needed to implement the plan	Problems to resolve	Who takes action, and by what date?	Review— results of actions Check all that apply.
<input type="checkbox"/> Policy <input type="checkbox"/> Collaboration <input type="checkbox"/> Repetition <input type="checkbox"/> Education <input type="checkbox"/> Support <input type="checkbox"/> Reward	<b>Action:</b>  <b>Marketing Plan:</b>  <b>Resources:</b>			<b>Communication:</b> <input type="checkbox"/> Great marketing <input type="checkbox"/> Need M-and-M's <b>Time:</b> <input type="checkbox"/> Good timing <input type="checkbox"/> Needs work <b>Location:</b> <input type="checkbox"/> Good <input type="checkbox"/> Needs work <b>Resources:</b> <input type="checkbox"/> Feasible cost <input type="checkbox"/> Good
<b>-Or-</b>  <b>Problems resolved:</b> <input type="checkbox"/> Communication <input type="checkbox"/> Time <input type="checkbox"/> Location <input type="checkbox"/> Lack of equipment <input type="checkbox"/> Other	<b>Action:</b>  <b>Marketing Plan:</b>  <b>Resources:</b>			<input type="checkbox"/> Needs work <b>Participation:</b> <input type="checkbox"/> Good <input type="checkbox"/> Needs work <b>Overall:</b> <input type="checkbox"/> Great-continue <input type="checkbox"/> Good-revise <input type="checkbox"/> Fair-revise
	<b>Action:</b>  <b>Marketing Plan:</b>  <b>Resources:</b>			

Comments: